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Managed File Transfer

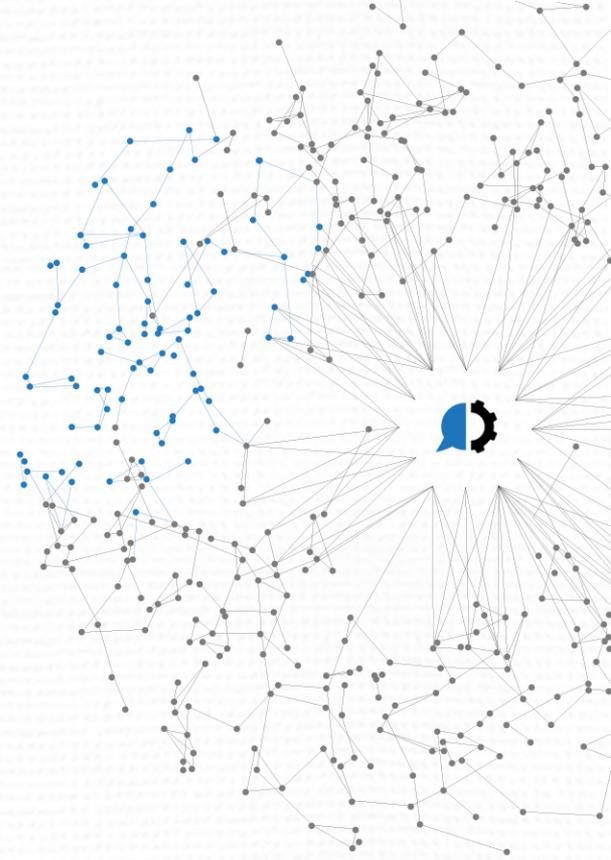
10 Ways to Improve Your Processes with GoAnywhere Advanced Workflows

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Today's Agenda

1. Introduction
2. 10 Ways to Use Advanced Workflows
3. Live Demo
4. Question & Answer



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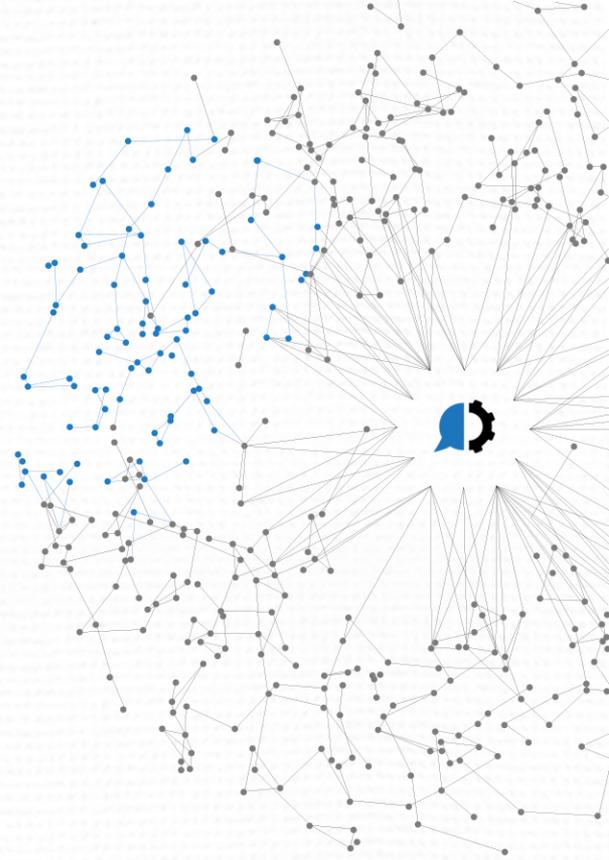
Today's Presenter



Dan Freeman, CISSP
Senior Solutions Consultant
HelpSystems



10 Ways to Use Advanced Workflows

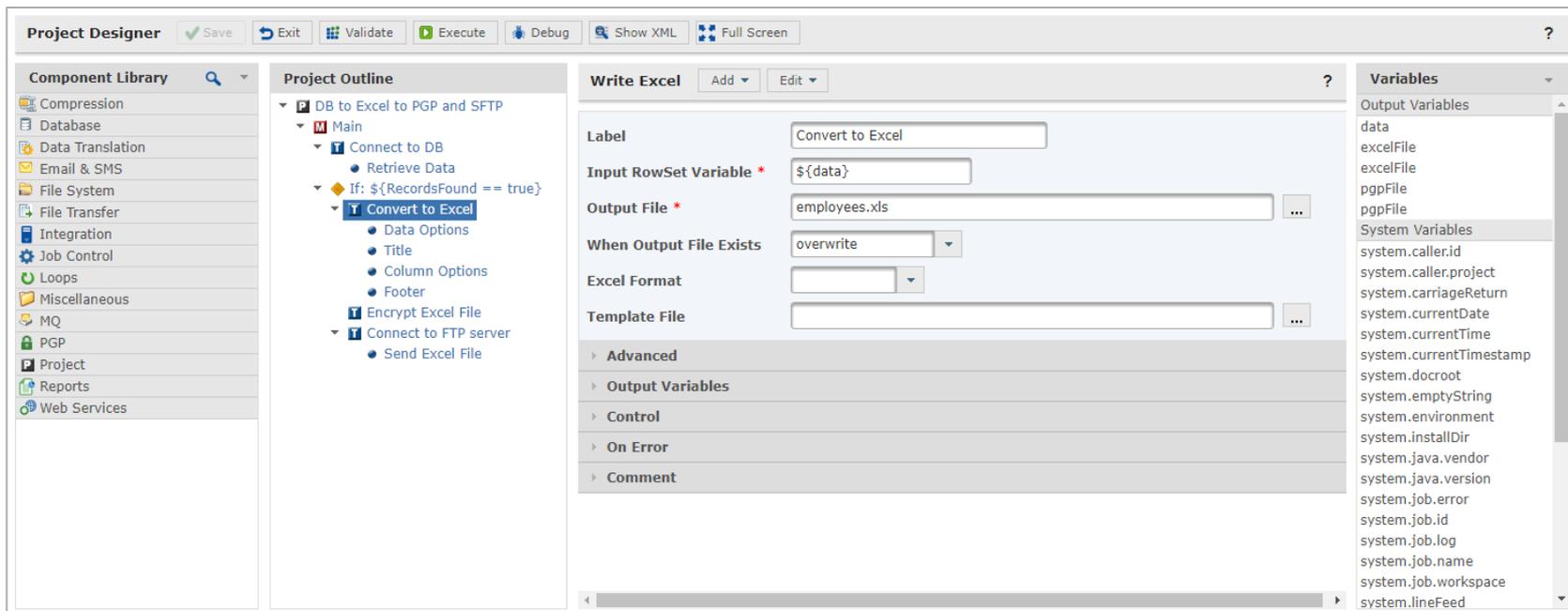


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Use #1: Create Projects with No Programming Skills

- ▶ Advanced Workflows are also known as Projects.
- ▶ These are simple to create and don't require programming skills.



The screenshot displays the 'Project Designer' application window. The top menu bar includes 'Save', 'Exit', 'Validate', 'Execute', 'Debug', 'Show XML', and 'Full Screen'. The interface is divided into several panes:

- Component Library:** A list of components such as Compression, Database, Data Translation, Email & SMS, File System, File Transfer, Integration, Job Control, Loops, Miscellaneous, MQ, PGP, Project, Reports, and Web Services.
- Project Outline:** A tree view showing the project structure: 'DB to Excel to PGP and SFTP' > 'Main' > 'Connect to DB' > 'Retrieve Data' > 'If: \${RecordsFound == true}' > 'Convert to Excel' (selected).
- Write Excel Configuration:** The main configuration area for the selected component. It includes:
 - Label:** 'Convert to Excel'
 - Input RowSet Variable *:** '\${data}'
 - Output File *:** 'employees.xls' (with a browse button)
 - When Output File Exists:** 'overwrite' (dropdown)
 - Excel Format:** (dropdown)
 - Template File:** (with a browse button)
 - Advanced, Output Variables, Control, On Error, and Comment:** Collapsible sections for further configuration.
- Variables:** A list of system variables under 'Output Variables', including 'data', 'excelFile', 'pdpFile', 'pgpFile', and various system variables like 'system.caller.id', 'system.currentDate', etc.

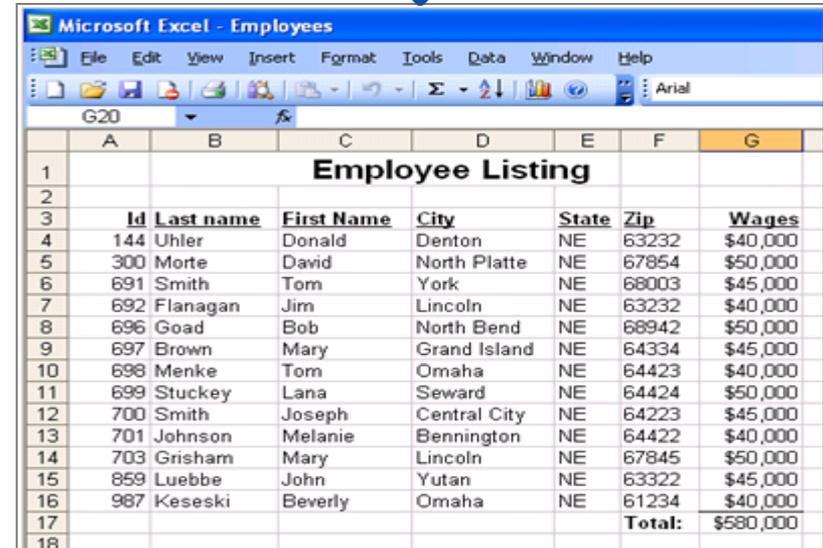
Use #2: Configure Advanced Workflows Resources

- ▶ You can use save time by configuring resources to:
 - ▶ Network locations
 - ▶ Email servers
 - ▶ File transfer servers
- ▶ This only needs to be done once, and then they can be used in other projects.



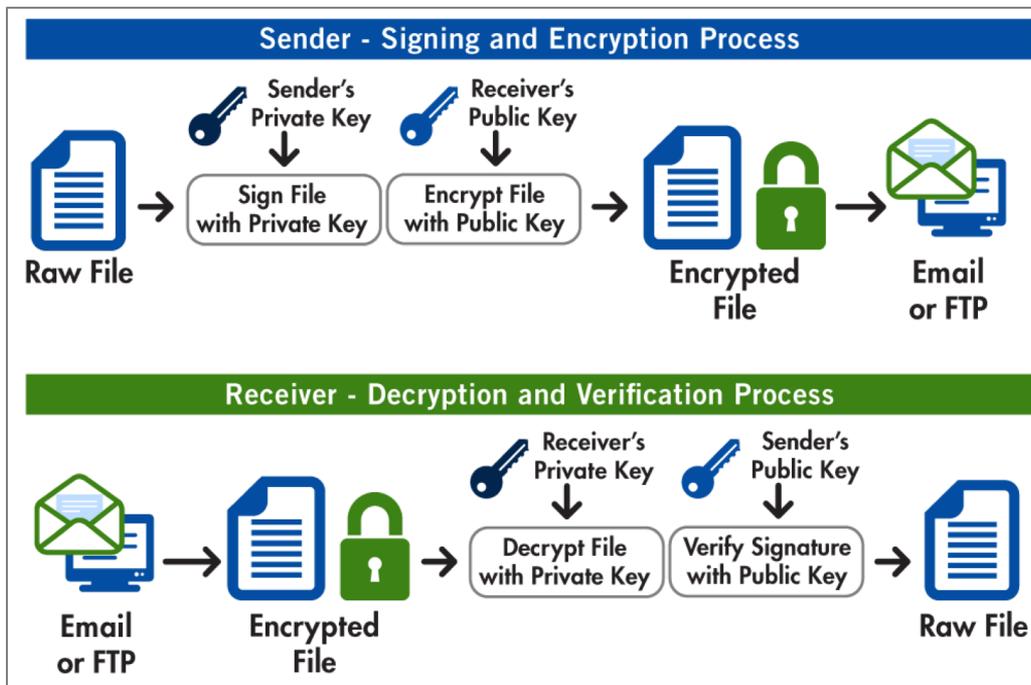
Use #3: Translate Data into Different Formats

- ▶ GoAnywhere Advanced Workflows comes with 15 tasks for data translation.
- ▶ These functions allow you to read/write files in multiple different formats.
- ▶ These tasks include:
 - ▶ Read/Write CSV, Excel, Fixed-Width-XML, JSON
 - ▶ Read Flat File
 - ▶ SQL query output to the various formats
 - ▶ Modify RowSet



	A	B	C	D	E	F	G	
1			Employee Listing					
2								
3		<u>Id</u>	<u>Last name</u>	<u>First Name</u>	<u>City</u>	<u>State</u>	<u>Zip</u>	<u>Wages</u>
4	144	Uhler	Donald	Denton	NE	63232	\$40,000	
5	300	Morte	David	North Platte	NE	67854	\$50,000	
6	691	Smith	Tom	York	NE	68003	\$45,000	
7	692	Flanagan	Jim	Lincoln	NE	63232	\$40,000	
8	696	Goad	Bob	North Bend	NE	68942	\$50,000	
9	697	Brown	Mary	Grand Island	NE	64334	\$45,000	
10	698	Menke	Tom	Omaha	NE	64423	\$40,000	
11	699	Stuckey	Lana	Seward	NE	64424	\$50,000	
12	700	Smith	Joseph	Central City	NE	64223	\$45,000	
13	701	Johnson	Melanie	Bennington	NE	64422	\$40,000	
14	703	Grisham	Mary	Lincoln	NE	67845	\$50,000	
15	859	Luebbe	John	Yutan	NE	63322	\$45,000	
16	987	Keseski	Beverly	Omaha	NE	61234	\$40,000	
17						Total:	\$580,000	
18								

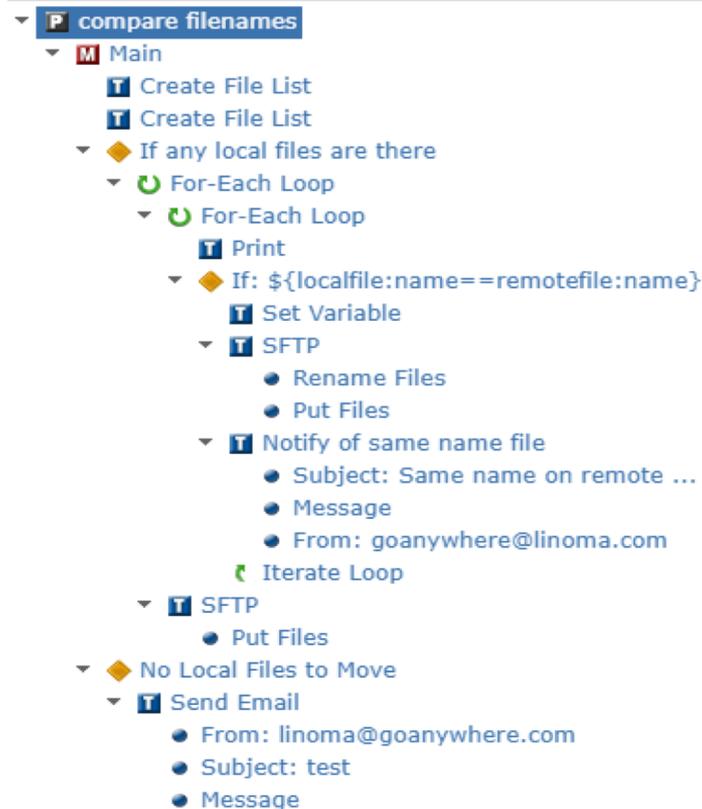
Use #4: Automate File Encryption/Decryption



- ▶ Advanced Workflows lets you automate the encryption and decryption process.
- ▶ You can encrypt and decrypt:
 - ▶ Documents
 - ▶ Digital Signatures/Verification
- ▶ Encryption is done with the OpenPGP standard.

Use #5: Create and Use Conditional Statements

- ▶ You can chain Advanced Workflow tasks together.
- ▶ These tasks will perform if the workflow runs and prior conditions are “true.”
- ▶ Conditional statements are made of “if/else” logic and loops.
- ▶ They will parse through variables or lists of files.



Use #6: Reference Projects as a Common Function

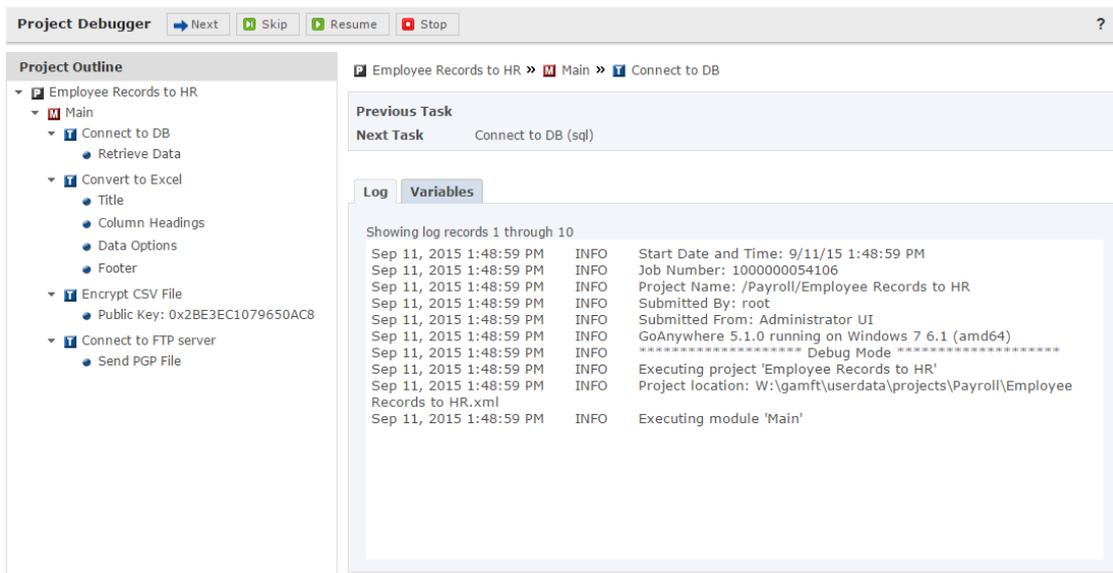
- ▶ Projects that you create can be called or referenced by multiple projects.
- ▶ They can be used by multiple projects as a common function or utility.

Project Outline

- ▼ **P** Common Error Project
 - ▼ **V** fromEmailAddr
 - ▼ **V** toEmailAddr
 - ▼ **V** emailSubject
 - ▼ **V** emailMessage
- ▼ **M** Main
 - ▼ **T** SQL
 - Query
 - ▼ **T** Send Email
 - From: \${fromEmailAddr}
 - Subject: \${emailSubject}
 - Message

Use #7: Run Workflows in Debug Mode

- ▶ You can run Advanced Workflows in Debug mode.
- ▶ This allows for easy troubleshooting of individual projects.
- ▶ For example: Interactively execute tasks one at a time to find a problem area.
- ▶ A job log and variable values are monitored during each step of the debug process.



The screenshot displays the Project Debugger interface. At the top, there are control buttons: Next, Skip, Resume, and Stop. The Project Outline on the left shows a workflow structure:

- Employee Records to HR
 - Main
 - Connect to DB
 - Retrieve Data
 - Convert to Excel
 - Title
 - Column Headings
 - Data Options
 - Footer
 - Encrypt CSV File
 - Public Key: 0x2BE3EC1079650AC8
 - Connect to FTP server
 - Send PGP File

The main area shows the current task: "Connect to DB (sql)". Below this, there are tabs for "Log" and "Variables". The Log tab is active, displaying a log of 10 records:

Time	Level	Message
Sep 11, 2015 1:48:59 PM	INFO	Start Date and Time: 9/11/15 1:48:59 PM
Sep 11, 2015 1:48:59 PM	INFO	Job Number: 1000000054106
Sep 11, 2015 1:48:59 PM	INFO	Project Name: /Payroll/Employee Records to HR
Sep 11, 2015 1:48:59 PM	INFO	Submitted By: root
Sep 11, 2015 1:48:59 PM	INFO	Submitted From: Administrator UI
Sep 11, 2015 1:48:59 PM	INFO	GoAnywhere 5.1.0 running on Windows 7 6.1 (amd64)
Sep 11, 2015 1:48:59 PM	INFO	***** Debug Mode *****
Sep 11, 2015 1:48:59 PM	INFO	Executing project 'Employee Records to HR'
Sep 11, 2015 1:48:59 PM	INFO	Project location: W:\gamft\userdata\projects\Payroll\Employee Records to HR.xml
Sep 11, 2015 1:48:59 PM	INFO	Executing module 'Main'

Use #8: Schedule and Automate GoAnywhere Reports

- ▶ Advanced Workflows can be used to schedule and automate reports.
- ▶ This includes:
 - ▶ Generating reports
 - ▶ Delivering reports
 - ▶ Sending email/text notifications
- ▶ GoAnywhere's built-in scheduler can be used to call projects.



Project	Schedule	Email Notification	Project Variables
Current Server Time		6/12/15 4:25:21 PM	
Schedule Frequency *		Weekly	
Schedule Options			
Start Date *		Jun 12, 2015	
Start Time *		12:00	
Run Every *		1 Weeks	
Days to Run *		<input type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat	
End Date			
Holiday Options			
Holiday Calendar		Holiday Calendar	
Holiday Rule *		Skip	
Repeat Options			
Frequency		Never	

Use #9: Control Data Security with Triggers

- ▶ You can control the security of your data with triggers.
- ▶ Triggers can be defined to monitor for certain events, e.g.:
 - ▶ Account Disabled
 - ▶ Download failed
 - ▶ Login Successful
- ▶ A triggered event can kick off a response like:
 - ▶ Receiving an email when a file is uploaded by a trading partner.
 - ▶ Automatically removing a partial file from a folder if the file upload is unsuccessful.
- ▶ Triggers can automate projects, send notifications based on user actions in GoAnywhere, and more.

Use #10: Monitor Files for Determined Events

Add Monitor Save Cancel

General | **Schedule** | **Project** | **Advanced** | **Email Notifications**

Monitor Name *

Domain

Description
145 Characters Remaining

Status Active Inactive

Monitor Location *

Folder * ...

Recursive

Event Type

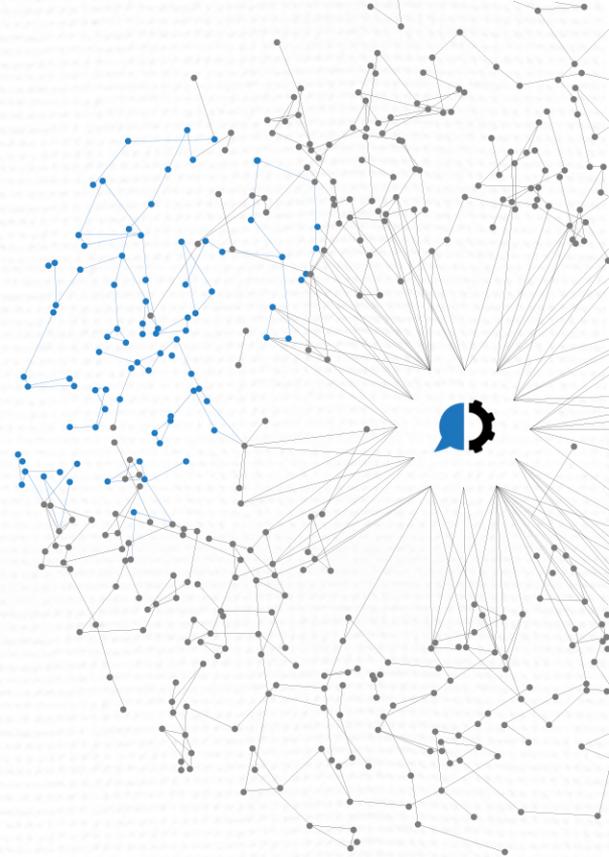
File Name Pattern *

Pattern Type

- ▶ Advanced Workflows can do file-based monitoring for certain events.
- ▶ Examples include monitoring for files that are:
 - ▶ Created or Modified
 - ▶ Created
 - ▶ Modified
 - ▶ Deleted
 - ▶ Exists



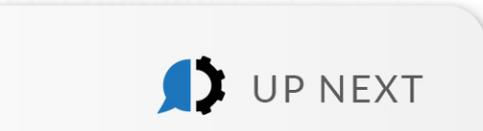
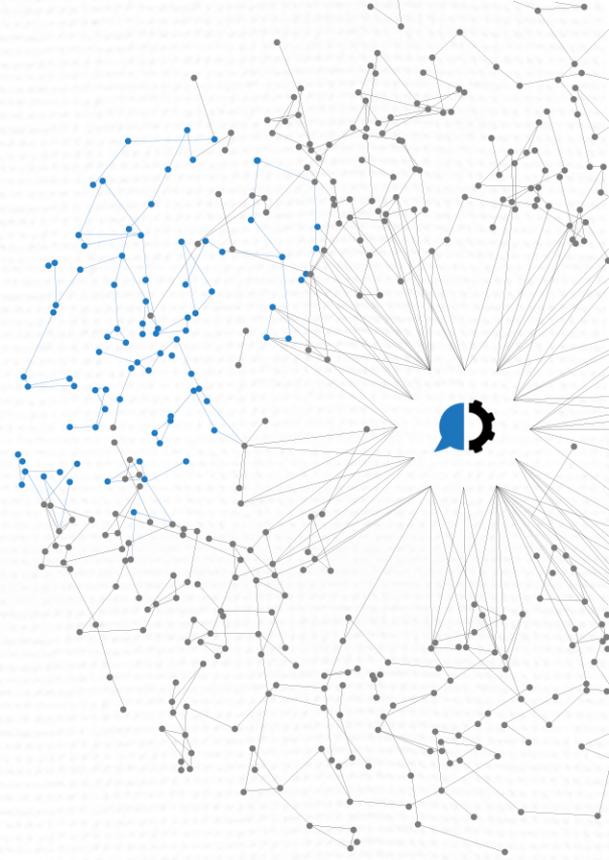
Live Demo



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Question & Answer



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Thank you for joining us!



New to GoAnywhere? Download our free 30-day trial at www.goanywhere.com/trial and try out Advanced Workflows for yourself!

Already using GoAnywhere? If you'd like to add the Advanced Workflows module, contact us at:

- ▶ goanywhere.sales@helpsystems.com
- ▶ Toll-free 1-800-949-4696
- ▶ Direct (402) 944-4242